

Use this form to apply for Recognition of Prior Learning (RPL) where you have completed prior studies that are equivalent to The Tax Institute Higher Education subjects. Please refer to the RPL policy regarding the number of subjects that may be granted for each program. Fees are applicable per subject and are non-refundable. Please refer to taxinstitute.com.au/education/policies-and-forms for policies and fees. Please retain original copy for your records. All prices quoted are in Australian dollars and include GST where applicable. HEPCO Pty Ltd trading as The Tax Institute Higher Education. ABN 30 642 863 787.

FORM A | WD

Date of issue: July 2024

1 Recognition of Prior Learning Application

<input type="checkbox"/> ATL001 CTA1 Foundations	\$200.00 (inc GST)	<input type="checkbox"/> ATL006 CommLaw3 Property Law	\$200.00 (inc GST)
<input type="checkbox"/> ATL003 CTA2A Advanced	\$200.00 (inc GST)	<input type="checkbox"/> ATL007 Advanced Superannuation	\$200.00 (inc GST)
<input type="checkbox"/> ATL004 CTA2B Advanced	\$200.00 (inc GST)	<input type="checkbox"/> ATL008 Tax for Trusts: from an SME perspective	\$200.00 (inc GST)
<input type="checkbox"/> ATL002 CommLaw1 Australian Legal Systems	\$200.00 (inc GST)	<input type="checkbox"/> ATL009 Corporate Tax	\$200.00 (inc GST)
<input type="checkbox"/> ATL005 CommLaw2 Entities and Business Structures	\$200.00 (inc GST)		

2 Candidate information

Candidate ID:

Title: ☐ Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other (please specify) Date of birth:

First name*: Last name*:

*This will appear on your testamur.

3 Contact information

☐ Please update my details

Personal details:

Home address:

Suburb/City: State: Postcode:

Country:
(if outside Australia)

Email:

Home tel: Mobile:

Employment/Business details:

Company: Position:

Address:

Suburb/City: State: Postcode:

Country:
(if outside Australia)

Bus tel: Bus fax:

4 Evidence Table

IMPORTANT INFORMATION:

If your previous education and experience are not listed in the table below, please add the details to the blank rows at the bottom of this table. You may be asked to provide relevant Subject Outlines and complete additional documentation at a later date.

Completed subjects/awards	Applying for exemption from
Chartered Accountants Australia and New Zealand Graduate Diploma of Chartered Accounting: <ul style="list-style-type: none"> – completed less than 10 years prior and – an undergraduate subject in tax and – 12 months' relevant professional experience 	<input type="checkbox"/> ATL001 CTA1 Foundations
Chartered Accountants Australia and New Zealand Graduate Diploma of Chartered Accounting: <ul style="list-style-type: none"> – completed less than 10 years prior and – an undergraduate subject in tax and – 12 months' relevant professional experience 	<input type="checkbox"/> ATL001 CTA1 Foundations <i>and</i> <input type="checkbox"/> ATL003 CTA2A Advanced
Australian law degree: <ul style="list-style-type: none"> – more than 10 years ago and – demonstration of specific subject equivalences and – a current practising certificate in an Australian jurisdiction 	Maximum two of: <input type="checkbox"/> ATL002 CommLaw1 Australian Legal Systems <input type="checkbox"/> ATL005 CommLaw2 Entities and Business Structures <input type="checkbox"/> ATL006 CommLaw3 Property Law
CPA Advanced Taxation and/or the previous Taxation segment: <ul style="list-style-type: none"> – completed less than 10 years prior and – an undergraduate subject in tax and – 12 months' relevant professional experience 	<input type="checkbox"/> ATL001 CTA1 Foundations <i>and</i> <input type="checkbox"/> ATL003 CTA2A Advanced
CPA Education Program: <ul style="list-style-type: none"> – completed more than 10 years prior (including the Taxation Segment) and – 12 months' relevant professional experience in the last three years 	<input type="checkbox"/> ATL001 CTA1 Foundations
Diploma of Financial Services (Financial Planning) or <ul style="list-style-type: none"> – Graduate Diploma of Applied Finance (Securities Institute/Kaplan) with SMSF specialisation or – CFP™ designee and completion of a commercial law subject/s in their degree or diploma and 12 months' relevant professional experience 	<input type="checkbox"/> ATL002 CommLaw1 ¹ <i>or</i> <input type="checkbox"/> ATL007 Advanced Superannuation <small>¹ Please note this may not meet the regulator's requirements for Tax (financial) advisers registering under TASA 2009.</small>
Completion of a recognised corporate program with significant work integrated and a coaching program sustained over more than 12 months	<input type="checkbox"/> ATL001 CTA1 Foundations
Course Provider: Subject Code: Subject Name:	
Course Provider: Subject Code: Subject Name:	
Course Provider: Subject Code: Subject Name:	

5 Checklist

Compulsory Evidence

- ☐ I have completed the Exemptions Applied for in Section 1
- ☐ I have completed the Evidence Table in Section 4
- ☐ I have attached copies of all relevant Academic Transcripts
- ☐ Evidence of relevant professional experience – copy of your current Résumé

Other Evidence:

- ☐ Letter from your employer confirming you have the required relevant Australian tax experience
- ☐ Evidence of current membership of a law institute or society, the IPA, CPA, ICAA or a practising certificate
- ☐ Evidence of satisfaction of continuing professional development (CPD) requirements

Other:

6 Candidate Declaration

I confirm that I have read and accept The Tax Institute Higher Education's policies and procedures (see taxinstitute.com.au/education for policies and fees), including:

- Enrolment,
- Deferring and Withdrawing,
- Membership, and
- Recognition of Prior Learning

I hereby declare that the information in this application is true and correct.

Full name:
(please print)

Signature:

Date of
signature:

DD/MM/YYYY

7 Payment

On completion of this form your application will be submitted for processing. Once completed, you will be contacted for payment, or you may submit the "Payment Authorisation Form".

Please complete this form and return by email to taxeducation@taxinstitute.com.au. Please refer to taxinstitute.com.au/education for policies and fees. Please retain original copy for your records. HEPCO Pty Ltd trading as The Tax Institute Higher Education. ABN 30 642 863 787.

FORM WD

1 Contact information

☐ Please update my details

Candidate ID:

Title: ☐ Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other (please specify)

First name: Last name:

Company:

Email:

Postal address:

Suburb / City: State: Postcode:

Country:
(if outside Australia)

Phone: Mobile:

Privacy: HEPCO Pty Ltd, trading as The Tax Institute Higher Education (HEPCO), a subsidiary of The Tax Institute ("TTI"), together with TTI collects, uses, holds and discloses personal information in accordance with TTI's Privacy Policy. By submitting your application to HEPCO, you confirm that you have read TTI's Privacy Policy and you consent to your personal information being collected, used and held by TTI and disclosed to third parties in accordance with TTI's Privacy Policy. TTI's Privacy Policy is available at taxinstitute.com.au/about-us/privacy-copyright-disclaimer.

2 Payment method

Please charge \$ to my ☐ AMEX ☐ Visa ☐ MasterCard

Name on card:

Card no.: Expiry date: Cardholder's signature:

For further information please contact us on **1300 829 338** or email taxeducation@taxinstitute.com.au.

To apply

Email taxeducation@taxinstitute.com.au
Mail Level 21, 60 Margaret Street, Sydney NSW 2000
Call 1300 829 338

Submit form